

# **2002 Economic Impact Survey of Visitors to Montana's State Parks and Fishing Access Sites**

Prepared for  
Montana State Parks  
A division of the Montana Department of Fish, Wildlife & Parks

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November 2002

**Bureau of Business and Economic Research  
The University of Montana**

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## **Abstract**

Montana Fish, Wildlife & Parks commissioned the University of Montana's Bureau of Business and Economic Research (BBER) to determine expenditures, economic impact, characteristics, satisfaction, and funding ideas of visitors to state parks and overnight visitors to fishing access sites. Contact information for visitors was gathered at 20 state parks and 31 fishing access sites (FAS) during the summer of 2002. BBER conducted telephone interviews of the visitors within a few weeks of their return from the site. A total of 862 visitors were interviewed (444 Montana residents and 418 nonresidents).

Results were described based on residency or based on visit to a park or FAS. Most differences were found between residents and nonresidents, although some differences between parks and FAS campers emerged.

## **Visitor Characteristics**

Resident vs Nonresident: Compared to residents, nonresidents were more likely to have a college degree, be slightly older and have a higher household income. Nonresidents were much more likely to be with family (46%) compared to residents who were more likely to be with family or family and friends at the site. Nonresidents traveled over 500 miles to the site compared to 92 miles for the average resident. Residents went to the site as their only destination (76%) compared to nonresidents (only 13% said the site was the only destination). Eighty percent of residents were return visitors to the site compared to 32 percent of nonresidents.

The top five activities for residents at the site or in the area were overnight camping, picnicking/day use, wildlife watching/nature study, fishing, and swimming. The top five activities participated in by nonresidents were visiting scenic/historical sites & museums, dining for pleasure, wildlife watching/nature study, overnight camping and shopping.

While both residents and nonresidents were satisfied with features at the sites, residents were slightly more satisfied than nonresidents on most features. Staff service, parking, signs and restrooms were the features that received the highest satisfaction ratings. Residents gave the lowest satisfaction ratings to shelters, showers and beaches. Satisfaction was highest among nonresidents for parking, staff service, picnic areas and trails. Nonresidents were least satisfied with beaches, shelters and water supply.

Residents were most in favor of dedicating a portion of the Governor's proposed tourism tax as a funding option for state parks followed by eliminating the \$4 day use and replacing it with a \$4 license plate fee. Residents were strongly opposed to cutting services and maintenance or eliminating the fee waivers/discounts for seniors as funding options. Nonresidents were only asked six of the funding questions. The two funding options that came out on top by nonresidents were to charge additional fees for special events and things like firewood collection followed by charging more at premium campsites. Like all the other groups, cutting service and maintenance or eliminating the fee waivers/discounts for seniors were not acceptable to nonresidents.

State Park vs FAS: Differentiation in visitor demographics was slight. Each group was more likely to have a high school degree over any other type of education followed by a bachelor's degree. Income levels were generally \$50K-\$100k or \$35K-\$50K and both groups were predominately supported with two incomes. Both groups were more likely to be family units followed by family and friends. Slight differences occurred between visitors. Park visitors from this sample were less likely to indicate that the park was their only destination (39% vs 53% of FAS). Fifty percent of park visitors were at the site for the first time compared to 34 percent of FAS visitors.

The top five activities for state park visitors at the site or in the area were wildlife watching/nature study, visiting scenic/historical sites & museums, dining for pleasure, picnicking/day use, and overnight

camping. The top five activities participated in by FAS visitors were overnight camping, fishing, wildlife watching/nature study, picnicking, and swimming.

Both park visitors and FAS visitors were satisfied with features to the sites. Park visitors rated the staff service the highest while FAS visitors rated parking and campgrounds the highest.

Visitors to parks and FAS both thought dedicating a portion of the Governor's proposed tourism tax as a funding option for state parks was the best funding option. However park visitors said the next best funding option should be charging additional fees for special events and things like firewood collection. Although currently there is no entrance fee at FAS sites, FAS visitors said eliminating the \$4 day use and replacing it with a \$4 license plate fee was the second best option. Both groups were strongly opposed to cutting services and maintenance or eliminating the fee waivers/discounts for seniors as funding options.

### **Expenditure Profiles and Economic Impact**

Resident vs. Nonresident: Resident visitors to state parks and overnight visitors to fishing access sites spent an average of \$8.57 per group per day around Montana, away from the FWP site visited, and \$31.70 per group per day at the site or in the local area, for a total of \$40.27. Nonresidents, on the other hand, spent three times that amount: an average of \$57.58 per group per day around Montana and \$66.57 per group per day at the site or in the local area, total of \$124.15 per group per day.

State Park vs. Overnight FAS Visitors: State park visitors spent an average of \$40.42 per group per day while traveling in Montana, and \$46.79 per group per day at the site or in the local area, totaling \$87.21. Overall, overnight visitors to fishing access sites spent \$71.51 per group per day, somewhat less than park visitors. Around Montana, they spent \$20.28 per group per day, and at the site or in the local area they spent \$51.23 per group per day.

Total spending by visitors to state parks and overnight visitors to fishing access sites totaled an estimated \$212.4 million, where close to \$68 million were spent around Montana and over \$144 million were spent at the site or in the local area. Of the nearly \$68 million spent around Montana, \$63.3 million was attributable to park visitors and \$4.7 million was attributable to overnight visitors to fishing access sites. Of the \$144 million spent at the site or in the local area, \$116 million was attributable to park visitors and \$28 million was attributable to overnight visitors to fishing access sites.

Nonresident visitors to state parks and nonresident overnight visitors to fishing access sites contributed to a sizeable economic impact for Montana. They spent a total of \$110.7 million in the state, of which the Montana-wide portion amounted to \$62.3 million and the site/local area portion amounted to \$48.4 million. These nonresident expenditures contributed to the generation of \$92.5 million in additional economic activity throughout Montana. It also helped generate 1,330 full-time and part-time jobs, and contributed \$26.5 million in personal income for Montana residents.

## INTRODUCTION

Montana State Parks, a division of Montana Fish, Wildlife and Parks (FWP), commissioned the Bureau of Business and Economic Research (BBER) at the University of Montana to collect current data on visitors to state parks and overnight visitors to fishing access sites during the summer of 2002. The primary purpose of the study was to determine the economic impact of Montana's state parks and fishing access sites. Secondary purposes were to identify who the visitors were, satisfaction levels, and evaluate funding ideas for state parks.

Montana State Parks is responsible for the maintenance and preservation of 42 state parks and 320 fishing access sites. The park system consists of three categories of parks: cultural parks, natural parks, and recreation parks. Fishing access sites range from primitive sites to sites with higher development levels.

The objectives of the study were:

1. To determine the economic impact of Montana's state parks and fishing access sites on the state.
2. To measure Montana resident spending associated with visiting a state park or fishing access site.
3. To measure nonresident spending associated with visiting a state park or fishing access site.
4. To determine demographic characteristics of state park and fishing access sites.
5. To examine visitor satisfaction with Montana's state-owned parks and fishing access including visitor preference and possible future needs.
6. To explore visitor preferences for funding options for state parks and fishing access sites.

## METHODOLOGY

### Survey Design

The survey was designed to replicate a 1989 State Park visitor survey as closely as possible. It was a second iteration of cross-sectional analysis designed to provide both a snapshot of current public opinion and trend analysis. Some continuity in design with the previous survey conducted in 1989 was needed to provide comparability with the results. Modification of the previous design was made to:

- Remove data elements that were not needed
- Add questions that reflect current visitor behavior
- Make the format appropriate for telephone survey administration.

The questionnaire was designed with close assistance from State Park staff. The questionnaire was field tested in early June and refined as needed.

### Sampling

The respondent selection process was influenced by the available budget. Sites were chosen based on resident visitation per year; nonresident visitation per year; full-time FWP staff; region, and park type. Because of the need for staff to be available at the site to collect visitor information, the sampling over represented FAS sites catering to overnight stays therefore day-use behavior was under represented. Sampling occurred at both parks and fishing access sites from Memorial Day to Labor Day, 2002.

Two different sampling methods were used in the study. At state parks, staff distributed cards requesting the name, address and phone numbers from people visiting the park. Staff explained that a telephone survey about their visit to the site would occur after they returned home and asked if they would be willing to provide the information for a future phone call. Visitors who chose to cooperate completed their contact information on a card and returned it to the personnel. Names and addresses were obtained at fishing access sites either from the fee envelopes left at the site or through distribution of contact information cards by volunteer site hosts. Fee envelopes were collected by state park staff and provided to BBER. This portion of the respondent selection was not a true random sample of the population since those visitors who choose not to provide contact information had no probability of sample selection. The data is a statistically valid representation of persons visiting the site and providing contact information.

Sampling days at state parks for the collecting of visitor contact information included one weekday (Wednesday), and one weekend day (Saturday) throughout the summer. Fishing access site contact information collection was obtained when envelopes were available or when hosts were able to obtain the contact information.

### Data Collection

Upon receipt of the contact information, BBER separated the potential respondents into resident and nonresident groups. The names were randomized, and resident and nonresidents were chosen in blocks of about one hundred each at several times throughout the summer season. The goal was to obtain a minimum of four hundred respondents for both the resident and nonresident groups.

After a name was chosen, the questionnaire was administered by telephone using a Computer-Assisted Telephone Interviewing (CATI) process. BBER staff, trained for telephone interviewing, conducted the interviews from a dedicated survey facility during July, August, and September 2002.

### Response Rate

Each potential respondent was called until an interview was completed. None were ruled "out of sample" unless the phone number was incorrect or disconnected. Therefore, the calculated response rate is almost 100 percent. This reflects the commitment of the respondent when they submitted the contact information to the FWP personnel as well as the repeated attempts by BBER to complete the survey.

Responses were obtained from people who visited 20 different state parks and 31 fishing access sites (Table 1). There were 444 residents of Montana surveyed and 418 nonresidents surveyed. Residents represented 39 of the 56 counties of Montana. Forty-six percent (n=231) of the respondents who visited state parks were residents while 54 percent (n=275) were nonresidents. Residents represented 60 percent (n=213) of fishing access sites while nonresidents represented 40 percent (n=143) of fishing access sites (Tables 2 & 3). This data is not a representation of the overall distribution of non-resident and resident visitors to the state parks system, only an indicator of the percentage of each type of visitor in the survey sample.

Table 1: Responses by Sample Site – State Parks and Overnight Fishing Access Sites\*

State Parks Sampled	N	Fishing Access Sites Samples	N	Fishing Access Sites Samples	N
1. Lewis & Clark Caverns	85	1. Thompson Chain of Lakes	61	19. Dailey Lake	5
2. Makoshika	75	2. Ennis	50	20. Indian Fort	5
3. Beavertail Hill	62	3. Harrison Lake	29	21. Eureka Reservoir	4
4. Cooney Reservoir	56	4. Mallards Rest	22	22. Stickney Creek	4
5. Missouri Headwaters	35	5. Salmon Fly	21	23. Martinsdale	3
6. Hell Creek	30	6. Somers	18	24. Smith Lake	2
7. Wayfarer	26	7. Loch Leven	16	25. Bearpaw	1
8. Bannack	25	8. Valley Garden	15	26. Chief Looking Glass	1
9. Whitefish Lake	21	9. Grey Bear	12	27. Harpers Lake	1
10. Giant Springs	19	10. Grey Cliff	11	28. Mountain Palace	1
11. Salmon Lake	17	11. Varney Bridge	10	29. Twelve Mile	1
12. Smith River	16	12. Water Birch	10	30. Intake	1
13. Pictograph Caves	15	13. Big Horn	8	31. Prewett	1
14. Black Sandy	9	14. Duck Creek	8		
15. Lone Pine	8	15. Craig	6	<b>TOTAL</b>	<b>356</b>
16. Chief Plenty Coup	7	16. Rosebud East	6		
17. Tongue Reservoir	6	17. Mid Canon	6		
18. Fort Owen	2	18. York Island	6		
20. Ulm Pishkun	2				
<b>TOTAL</b>	<b>506</b>				

\* The sample represents all types of parks but only fishing access sites with overnight camping.

Table 2: Sampling Results: Montana Resident Visitor (County of Residency)

Park Visitor	N	Fishing Access Site	N
Yellowstone	51	Flathead	47
Missoula	27	Gallatin	46
Flathead	22	Yellowstone	26
Dawson	18	Lincoln	16
Lewis & Clark	15	Lewis & Clark	10
Cascade	13	Missoula, Park, Butte-Silver Bow	7 each
Gallatin	12	Cascade, Jefferson, Lake, Stillwater	5 each
Carbon	11	Ravalli	4
Custer & Ravalli	7 each	Broadwater, Hill, Madison	3 each
Park & Stillwater	6 each	Fergus, Pondera, Valley	2 each
Butte-Silver Bow & Teton	4 each	Choteau, Deer Lodge, Powell, Richland, Roosevelt, Rosebud, Sanders, Teton	1 each
Beaverhead, Deer Lodge, Lake	3 each		
Broadwater, Lincoln, Rosebud, Sweet Grass, Valley	2 each		
Big Horn, Blaine, Jefferson, Musselshell, Pondera, Powder River, Sheridan, Toole	1 each		
<b>TOTAL</b>	<b>231</b>	<b>TOTAL</b>	<b>213</b>

Table 3: Sampling Results: Respondents Home State by Type of Site Visited

Park Visitor	N	Fishing Access Site	N
Individual States		Individual States	
Montana	231	Montana	213
Washington	53	Washington	21
California	29	Idaho	17
Idaho	17	CA, CO, OR, UT, WY	10 each
Wisconsin	14	Minnesota	6
Minnesota	13	New Mexico	5
Canada	11	Michigan	4
Oregon	10	Wisconsin	3
Illinois	9	Florida, Illinois, Penn.	2 each
Michigan, Utah, Wyoming	8 each	Nevada, Canada	1 each
Florida	7		
Pennsylvania	6		
Colorado	6		
Alaska, Nevada	2 each		
Arizona	1		
Grouped States/Regions		Grouped States/Regions	
Midwest (IA, KS, NE, MO)	16	S. East (GA,LA, SC, NC, TN)	7
Texas or Oklahoma	12	N. East (RI, NH, MA, NJ, NY, CT)	6
Ohio or Indiana	12	North or South Dakota	4
North or South Dakota	10	Texas or Oklahoma	4
South East (GA, LA, SC, NC, TN)	8	MD, VA, WV	3
North East (RI, NH, MA, NJ, NY, CT)	8	Midwest (IA, KS, NE, MO)	2
MD,VA, or WV	5		
TOTAL	506	TOTAL	356



## FINDINGS

The findings of the study begin with a description of the respondent demographics, group characteristics, trip characteristics, satisfaction and funding options for each group: state park vs fishing access site; resident vs nonresident. This is followed by a description and analysis of the spending behaviors of visitors based on residency and by parks and fishing access site visits followed by the economic impact of nonresidents.

## RESPONDENT AND TRIP CHARACTERISTICS

This section will outline the respondent demographics, the group characteristics, the trip characteristics, satisfaction with the FWP site, and ideas for funding options.

### Demographics

State Park vs FAS: Respondents of state parks and fishing access sites were nearly identical in their demographic characteristics. The main difference between the two groups was a higher number of male respondents representing the fishing access sites (61% FAS vs 51% at state parks). A similar difference was found with respect to residency of the respondents. Fifty-nine percent of fishing access site respondents were from Montana compared to 46 percent at the state parks (Table 4). However, according to State Parks, visitation in 2002 showed that 76 percent of FAS visitors were residents while 69 percent of all state park visitors were residents. The difference in residency of the sample is primarily due to the need to survey an equal number of nonresidents as residents.

Residents vs Nonresidents: A difference in demographic profile was observed based on residency. Nonresidents were more likely to have a Bachelors or Masters degree while residents were more likely to have a high school degree. Resident respondents were slightly younger (47 vs 52 yrs. old for nonresidents). Nonresidents had much higher household income levels than residents (23% earn \$100K+).

**Table 4. Respondent Demographics**

		<b>Park Visitor</b>	<b>Fishing Access Site</b>	<b>Resident</b>	<b>Non- Resident</b>
Respondent Education	<High School	<1%	<1%	<1%	<1%
	HS graduate	33%	39%	45%	25%
	Some college	23%	19%	21%	21%
	Bachelor	28%	25%	24%	30%
	Masters Degree	11%	12%	5%	18%
	Doctorate	3%	3%	2%	3%
	Medical Degree	1%	1%	1%	1%
Respondent Average Age		<b>49.2</b>	<b>50.4</b>	<b>47.3</b>	<b>52.2</b>
Respondent Gender	Male	51%	61%	57%	53%
	Female	49%	39%	43%	47%
<b>Race of Respondent</b>	White	94%	95%	98%	99%
	American Indian	4%	4%	4%	5%
	Hispanic Origin	<1%	<1%	<1%	-
	Black/African American	1%	<1%	<1%	<1%
	Other	-	-	<1%	-
<b>Household Income</b>	<\$10,000	11%	12%	10%	13%
	\$10,000-\$14,999	1%	1%	2%	-
	\$15,000-\$19,999	2%	3%	3%	2%
	\$20,000-\$34,999	12%	13%	17%	8%
	\$35,000-\$49,999	20%	19%	23%	18%
	\$50,000-\$99,999	36%	34%	37%	36%
	\$100,000+	14%	16%	8%	23%
<b># of people contributing to Household Income</b>	1	29%	26%	28%	27%
	2	67%	69%	68%	67%
	3	2%	2%	2%	2%
Residency	Montana	46%	59%		
	Non-resident	54%	41%		

## Group Characteristics

State Park vs FAS: Families were the most frequent type of group at the sites (34% for parks and 39% for FAS) followed by family and friends (21% for parks and 18% for FAS). However, the number of people in the party was usually two and the number of people in the vehicle was two or one. The average group size/vehicle for park visitors was 2.09, nearly the same as the FAS visitor group size/vehicle of 2.05.

Resident vs Nonresident: Nonresidents were much more likely to be in family groups than residents (46% compared to 28%), however residents were more likely to be a group of family and friends (24% compared to 17% for nonresidents). Resident group size/vehicle (2.30) is quite a bit larger than the nonresident group size of 1.83/vehicle.

**Table 5. Group Characteristics**

		<b>Park Visitor</b>	<b>Fishing Access Site</b>	<b>Resident</b>	<b>Non-Resident</b>
<b>Group Description</b>	Family	34%	39%	28%	46%
	Family & Friends	21%	18%	24%	17%
	Friends	17%	14%	14%	18%
	Org. Group	8%	7%	9%	6%
	Bus. Assoc.	8%	6%	9%	5%
	Couple	4%	7%	8%	2%
	Alone	6%	7%	7%	7%
<b># In Party</b>	1	8%	10%	9%	8%
	2	42%	51%	40%	50%
	3	16%	10%	12%	16%
	4	17%	18%	21%	14%
	5	9%	6%	9%	7%
	6+	8%	4%	8%	5%
<b>Average Party Size</b>		<b>3.03</b>	<b>2.72</b>	<b>3.05</b>	<b>2.76</b>
<b># in Vehicle</b>	1	34%	37%	26%	45%
	2	44%	37%	44%	38%
	3	7%	13%	8%	10%
	4	12%	12%	18%	12%
	5	2%	1%	3%	<1%
	6+	1%	1%	1%	<1%
<b>Average Vehicle Group Size</b>		<b>2.09</b>	<b>2.05</b>	<b>2.30</b>	<b>1.83</b>

## Trip Characteristics

**State Park vs FAS:** The park visitor stayed away from home slightly longer than the FAS visitor but spent less time in Montana and less at the site than those at fishing access sites. Park visitors were further from home than FAS visitors and less likely to call the site their only destination. However, park visitors were more likely than FAS visitors to be at the park for the first time.

**Resident vs Nonresident:** Not surprisingly, nonresidents spent more days away from home compared to residents and slightly more nights at the FWP site than the resident visitor (3 nights compared to 2 nights at the site). One-quarter of the residents were on a day trip only. While residents were close to home (92 miles away on average), nonresidents traveled over 500 miles to the site. For residents, the FWP site was usually their primary destination and 79 percent had been to that site previously. Nonresidents, on the other hand were going elsewhere as their primary destination and 32 percent had been to the site before this trip.

**Table 6. Trip Characteristics**

		<b>Park Visitor</b>	<b>Fishing Access Site</b>	<b>Resident</b>	<b>Non-Resident</b>
<b>Average nights away from home</b>	Mean	8.54	7.14	2.69	13.58
	Median	6	4	2	11
	% zero nights	18%	8%	26%	1%
<b>Average nights spent in Montana</b>	Mean	4.78	5.03	2.48	7.43
	Median	3	3	2	5
	% zero nights	19%	8%	26%	2%
<b>Average nights spent at FWP site</b>	Mean	2.25	2.89	2.04	3.00
	Median	1	2	2	2
	% zero nights	32%	9%	29%	16%
<b>Flew on a portion of trip</b>		8%	4%	-	12%
<b>Rented Auto</b>		7%	3%	-	11%
<b>Where Auto was rented</b>	MT	23	3	3	25
	UT	4	-	-	4
	WA, WY	2 ea.	1 ea	-	3 ea.
	CO	1	1	-	1
	Other	4	2	-	6
<b>Started trip from principal residence</b>		91%	94%	96%	88%
<b>Miles from home</b>	Mean	276	209	92	500+
	Median	300	90	50	500+
<b>FWP site was only destination on this trip</b>		39%	53%	76%	13%
<b>When FWP site was one of several destinations, this was the principal destination</b>		47%	64%	86%	20%
<b>First visit to this site</b>		50%	34%	21%	68%

## Activities at the Site and Local Area

This question asked respondents to indicate whether or not someone in their group participated in any of the listed activities at the site or in the local area. Only two activities emerged in the top five for each of the four groups – wildlife watching/nature study and overnight camping. Overnight camping is expected to be high since the sampling designed catered more to overnight sites. The difference between park and FAS activities is that people at parks visit scenic/historical sites and dine for pleasure while FAS visitors fish and swim. The difference between resident and nonresident visitors is that residents picnic, fish, and swim while nonresidents visit scenic/historic sites, dine for pleasure, and shop.

### State Park: Top Five Activities

Wildlife watching/nature study (60%)  
Visiting scenic/historical sites/museums (55%)  
Dining for pleasure (52%)  
Picnicking/day use (51%)  
Overnight camping (49%)

### FAS: Top Five Activities

Overnight camping (86%)  
Fishing (73%)  
Wildlife watching/nature study (63%)  
Picnicking (56%)  
Swimming (41%)

### Resident: Top Five Activities

Overnight camping (68%)  
Picnicking/day use (59%)  
Wildlife watching/nature study (57%)  
Fishing (56%)  
Swimming (48%)

### Nonresident: Top Five Activities

Visiting scenic/historical sites/museums (67%)  
Dining for pleasure (65%)  
Wildlife watching/nature study (65%)  
Overnight camping (60%)  
Shopping (53%)

**Table 7. Activities Participated in While at the Site or in the Local Area**

Activities	Park Visitor	Fishing Access Site	Resident	Non-Resident
<b>Fishing</b>	29%	73%	56%	35%
<b>Picnicking/day use</b>	51%	56%	59%	47%
<b>Overnight camping</b>	49%	86%	68%	60%
<b>Backpacking</b>	2%	3%	2%	3%
<b>Day hiking</b>	40%	25%	26%	42%
<b>Wildlife watching/ nature study</b>	60%	63%	57%	65%
<b>Visit scenic or historic sites/ museums etc.</b>	55%	30%	23%	67%
<b>Entertainment activities*</b>	14%	10%	10%	14%
<b>Driving off-road</b>	4%	5%	5%	5%
<b>Bicycling</b>	5%	13%	10%	6%
<b>Motorboating/waterskiing, jet ski</b>	22%	23%	37%	6%
<b>Sailing, rafting, canoeing, floating</b>	13%	34%	24%	19%
<b>Swimming</b>	33%	41%	48%	23%
<b>Jogging, running</b>	6%	8%	5%	9%
<b>Horseback riding</b>	3%	<1%	<1%	3%
<b>Games like baseball, volleyball</b>	5%	6%	7%	3%
<b>VFR, family reunions</b>	32%	32%	31%	33%
<b>Dining for pleasure</b>	52%	41%	31%	65%
<b>Shopping</b>	40%	29%	18%	53%
<b>Other</b>	3%	1%	2%	3%

\*Outdoor performances, fairs, festivals, ceremonies, etc.

## Likes and Dislikes about the Site

This question is only analyzed by site type and does not include a resident/nonresident comparison. The important question is what is good and bad about the site, not what is good and bad based on where the respondent lives. This question was an open-ended question and each respondent had to say something, even if they said everything was great about the site. Because of the question type (open-ended) it is much more difficult to analyze with an infinite number of possible responses. These answers were grouped together for like responses and provided in Table 16. Only those responses that were repeated by a significant number of people were reported.

**State Parks:** The most common response of what was liked best about the state park site was the beauty and scenic views at the park followed by the friendly/knowledgeable staff. The location of the park close to home or close to the highway was mentioned along with simply liking the campground. While the least liked aspects grouped into "lack of services;" the agreement on what service was lacking was low. Some people wanted drinking water, others wanted showers, some mentioned bathrooms and others mentioned a need for interpretive displays. The next disliked aspect of the state park was the noise, the crowded conditions, and the bad neighbor. Many respondents, however, said there was nothing wrong with the site.

**FAS:** People like their access to the river or lake more than any other aspect about the fishing access site, however, the uncrowded/quiet site was also mentioned often by the respondent closely followed by the location being close to home. Like the state parks, respondents mentioned the lack of services as a disliked aspect about the site, but at the same time, the same number of people said there was nothing wrong with the site. A few people mentioned the crowded area, noisy, and bad neighbors as a least liked aspect of the site.

Table 8. Likes and Dislikes About Sites

<b>State Parks</b>				<b>Fishing Access Sites</b>			
<b>Liked <i>best</i> about the site</b>		<b>Liked <i>least</i> about the site</b>		<b>Liked <i>best</i> about the site</b>		<b>Liked <i>least</i> about the site</b>	
	<b>N</b>		<b>N</b>		<b>N</b>		<b>N</b>
Scenery/beauty	64	Lack of services: electric, water, showers, parking, bathrooms, Interpretation.	35	Access to river/lake, close to river	50	Lack of services: electric, water, showers, parking, bathrooms, Interpretation	20
Friendly staff/knowledgeable	51	Crowded, noisy, train, bad neighbor	34	Uncrowded/quiet/privacy	44	Nothing was wrong	20
Location/close to home/close to hwy	38	Nothing was wrong	25	Location/close to home	43	Crowded, noisy, bad neighbors	13
Liked campground/site	38	Bad roads	25	Liked campground/site	41	Campsite arrangement/ lack of sites	11
Historic structures/preservation	33	Campsites: too many/too few, RVs	15	Scenery/beauty	30	Not clean	11
Clean/well kept	32	Jet skis/boats	10	Good fishing	20	No trees/no shade	10
Uncrowded/quiet/privacy	26	Rude staff	8	Clean	16		
Access to river/ lake	12	No trees/no shade	6				

With both the state parks and the fishing access sites, respondents were able to agree on the good things about the site more than the dislikes. This may be partly due to the lack of ease to come up with something bad if the person had an overall good experience. In the question related to overall satisfaction with the site, 89 percent of park visitors were satisfied or very satisfied with the park and 83 percent with satisfied or very satisfied with the fishing access site (Tables 10 & 12).

## **Satisfaction with Features at Site**

When analyzing the data on satisfaction it is important to note the percent of respondents who indicated they did not have contact with a particular feature (first two columns of Tables 9 & 11). These “no-contact” responses reduced the number of respondents factored into the satisfaction answers. Any feature where 90 percent of the respondents did not have contact with the feature were left out of the analysis.

State Parks: Visitors to the parks were very satisfied with the features the parks offered. Visitors rated staff service the highest in their satisfaction followed by parking, trails, signs, and the picnic area. Beaches and boat docks received the lowest satisfaction rating, but still remained in the satisfied category (Table 9).

FAS: Visitors to the fishing access sites were very satisfied with the features at the sites. Visitors rated the parking the highest followed by the campgrounds, signs, and the picnic areas. Shelters and water supply got the least satisfaction rating, probably due to the fact that most fishing sites do not offer those amenities but when asked, many would have liked to have them available (Table 9).

Resident: While both residents and nonresidents were satisfied with features to the sites, residents were slightly less satisfied than nonresidents on most features. Staff service, parking, signs and restrooms were the features that received the highest satisfaction ratings. Residents gave the lowest satisfaction ratings to shelters, showers and beaches (Table 11).

Nonresident: Satisfaction was highest among nonresidents for parking, staff service, picnic areas and trails. Nonresidents were least satisfied with beaches, shelters and water supply (Table 11).

## **Funding Options**



State Parks: Visitors to state parks were more likely to agree to dedicating a portion of the Governor’s proposed tourism tax for state parks as a funding option for state parks and to charging additional fees for special events and such things as firewood collection for funding options. State Park visitors were strongly opposed, however, to cutting services and maintenance or eliminating the fee waivers/discounts for seniors as funding options (Table 13).

FAS: Similar to state park visitors, the funding option that received the most agreement was the idea of dedicating a portion of the Governor’s proposed tourism tax for state parks. However, the second funding option most likely to gain support from FAS visitors was eliminating the \$4 day use and replacing it with a \$4 license plate fee to go to state parks. The funding option idea with the strongest opposition was eliminating the fee waivers/discounts for seniors and cutting services and maintenance (Table 13).

Residents: Residents were most in favor of dedicating a portion of the Governor’s proposed tourism tax as a funding option for state parks followed by eliminating the \$4 day use and replacing it with a \$4 license plate fee. Residents were strongly opposed to cutting services and maintenance or eliminating the fee waivers/discounts for seniors as funding options (Table 14).

Nonresidents: Because of the relevance to the respondent, nonresidents were only asked six of the funding questions. The two funding options that came out on top were by nonresidents were to charge additional fees for special events and things like firewood collection followed by charging more at premium camp sites. Like all the other groups, cutting service and maintenance or eliminating the fee waivers/discounts for seniors were not acceptable to nonresidents (Table 14).

**Table 9. Satisfaction with Features at State Parks or Fishing Access Sites by Visitors**

	Park	FAS	Park	FAS	Park Visitor*					Fishing Access Site Visitor*						
	% no contact with feature		Mean Satisfaction		Not at all Satisfied					Very Satisfied	Not at all Satisfied					Very Satisfied
Roads	<1%	1%	4.09	3.95	4%	5%	16%	29%	46%		3%	7%	18%	34%	37%	
Parking	<1%	1%	4.47	4.24	1%	3%	9%	24%	64%		2%	4%	14%	29%	51%	
Trails	33%	56%	4.30	3.97	1%	3%	14%	27%	55%		6%	5%	19%	28%	43%	
Signs	3%	5%	4.30	4.06	1%	3%	12%	33%	51%		2%	6%	16%	34%	42%	
Interpretive Displays	30%	62%	4.29	3.98	1%	2%	14%	33%	50%		5%	5%	17%	34%	39%	
Rest rooms	15%	12%	4.34	3.98	1%	3%	10%	32%	54%		4%	7%	15%	35%	39%	
Water supply	33%	69%	4.08	3.45	4%	6%	13%	31%	46%		16%	11%	16%	28%	29%	
Picnic area	29%	27%	4.30	4.04	1%	4%	12%	30%	53%		2%	3%	20%	37%	37%	
Campground	41%	11%	4.25	4.12	3%	3%	10%	34%	50%		1%	3%	16%	40%	39%	
Boat ramp	68%	43%	4.01	3.99	6%	4%	16%	35%	40%		4%	6%	15%	38%	37%	
Boat dock	74%	84%	3.73	3.48	8%	11%	20%	25%	37%		15%	6%	24%	28%	28%	
Beach	73%	66%	3.65	3.50	5%	15%	17%	35%	27%		8%	10%	29%	31%	22%	
Shelters	65%	88%	3.69	3.16	6%	11%	23%	28%	32%		16%	12%	21%	19%	28%	
Showers	84%	93%	3.85	2.65	13%	7%	10%	20%	50%		In sufficient numbers					
Staff service	17%	78%	4.53	3.76	2%	2%	5%	25%	66%		12%	5%	18%	27%	39%	



\*1=not at all satisfied, 5=very satisfied

**Table 10. Overall Satisfaction with Site**

	Parks	FAS
<b>Not at all Satisfied</b> 1	1%	2%
2	3%	3%
3	6%	13%
4	27%	35%
<b>Very Satisfied</b> 5	62%	47%
<b>Mean Satisfaction</b>	4.48	4.24



**Table 11. Satisfaction with Features at State Parks/Fishing Access Sites Based on Residency**



	Res.	Non Res.	Res.	Non Res.	Resident*					Non-resident*						
	% no contact with feature		Mean Satisfaction		Not at all Satisfied					Very Satisfied	Not at all Satisfied					Very Satisfied
Roads	-	1%	3.94	4.14	4%	8%	19%	29%	40%	3%	4%	15%	33%	45%		
Parking	3%	1%	4.23	4.54	2%	5%	13%	28%	52%	1%	1%	9%	24%	66%		
Trails	48%	37%	4.12	4.26	3%	3%	20%	25%	49%	2%	3%	12%	29%	53%		
Signs	4%	4%	4.24	4.18	2%	4%	13%	32%	50%	1%	4%	15%	35%	45%		
Interpretive Displays	49%	36%	4.17	4.23	3%	3%	16%	32%	47%	2%	3%	14%	34%	48%		
Rest rooms	11%	17%	4.20	4.19	2%	5%	12%	34%	48%	3%	5%	12%	34%	47%		
Water supply	53%	42%	3.83	4.01	8%	10%	15%	26%	42%	6%	5%	12%	35%	42%		
Picnic area	22%	34%	4.10	4.31	2%	4%	20%	32%	43%	1%	3%	11%	34%	51%		
Campground	23%	36%	4.15	4.23	2%	4%	14%	37%	43%	2%	3%	12%	37%	46%		
Boat ramp	42%	76%	3.95	4.14	6%	5%	16%	37%	37%	1%	6%	15%	35%	44%		
Boat dock	66%	91%	3.55	-	11%	11%	23%	23%	32%	In sufficient numbers						
Beach	58%	84%	3.50	3.80	7%	13%	25%	31%	23%	3%	12%	17%	39%	29%		
Shelters	71%	77%	3.28	4.00	12%	17%	25%	20%	25%	3%	3%	19%	35%	39%		
Showers	86%	89%	3.30	-	25%	10%	8%	18%	38%	In sufficient numbers						
Staff service	48%	35%	4.29	4.51	5%	3%	9%	27%	57%	2%	2%	6%	24%	67%		

\*1=not at all satisfied, 5=very satisfied

**Table 12. Overall Satisfaction with Site**



	Resident	Nonresident
<b>Not at all Satisfied</b> 1	2%	1%
2	4%	2%
3	9%	8%
4	36%	25%
<b>Very Satisfied</b> 5	49%	63%
<b>Mean Satisfaction</b>	4.28	4.50

Table 13. Funding Option Ideas Based on Visitors at State Parks and Fishing Access Sites

Funding Options	Park	FAS	Park	FAS	Park Visitor*					Fishing Access Site Visitor*				
	% don't know		Mean		Strongly Oppose				Strongly Agree	Strongly Oppose				Strongly Agree
Increase user fees at parks	2%	3%	3.22	2.97	15%	8%	35%	23%	18%	23%	9%	32%	21%	16%
Increase proportion of existing state taxes that go to parks	4%	7%	3.21	2.96	18%	6%	29%	30%	17%	20%	13%	31%	25%	12%
Increase state taxes to fund state parks	3%	3%	2.69	2.45	30%	11%	30%	19%	10%	35%	16%	28%	11%	10%
Cut services and maintenance	4%	4%	1.71	1.83	63%	16%	13%	5%	4%	58%	14%	19%	6%	3%
Eliminate \$4 day use and replace with \$4 license plate fee to go to state parks	3%	5%	3.20	3.31	29%	8%	12%	16%	35%	29%	6%	8%	18%	40%
Charge more at premium camp sites	6%	6%	3.20	3.05	24%	6%	21%	27%	23%	26%	10%	21%	19%	24%
Charge additional fees for special events, firewood collection, etc.	3%	4%	3.47	3.30	13%	7%	22%	35%	23%	18%	10%	20%	28%	24%
Increase season pass	12%	14%	3.16	2.96	20%	9%	27%	24%	21%	26%	12%	22%	22%	19%
Eliminate fee waivers/ discounts for seniors	1%	3%	1.91	1.77	61%	12%	11%	8%	8%	67%	10%	8%	8%	6%
Create & charge a non-motorized boat decal	4%	6%	2.50	2.12	39%	12%	21%	17%	12%	58%	6%	13%	13%	10%
Statewide mill levy	3%	6%	2.66	2.25	33%	10%	28%	17%	13%	47%	9%	24%	14%	7%
Dedicate a portion of Governor's proposed tourism tax for state parks	1%	6%	3.97	3.95	12%	1%	15%	24%	49%	11%	3%	12%	27%	47%

\*1=Strongly Oppose, 5=Strongly Support

Table 14. Funding Option Ideas Based on Residency

Funding Options	Res.	Non. Res.	Res.	Non. Res.	Resident*					Non-resident*					
	% don't know		Mean		Strongly Oppose					Strongly Agree	Strongly Oppose				
Increase user fees at parks	1%	4%	2.82	3.44	24%	11%	35%	21%	10%	12%	6%	33%	24%	25%	
Increase proportion of existing state taxes that go to parks	5%	NA	3.09	NA	19%	9%	30%	28%	14%	Not Asked					
Increase state taxes to fund state parks	3%	NA	2.58	NA	32%	13%	29%	15%	10%	Not Asked					
Cut services and maintenance	2%	6%	1.83	1.67	58%	14%	17%	6%	4%	64%	16%	13%	5%	3%	
Eliminate \$4 day use and replace with \$4 license plate fee to go to state parks	4%	NA	3.25	NA	29%	7%	10%	17%	37%	Not Asked					
Charge more at premium camp sites	4%	8%	2.80	3.51	32%	9%	24%	20%	17%	17%	6%	18%	29%	31%	
Charge additional fees for special events, firewood collection, etc.	3%	4%	3.17	3.66	19%	10%	23%	31%	17%	11%	6%	19%	33%	31%	
Increase season pass	6%	2%	2.75	3.50	30%	11%	24%	22%	12%	13%	8%	25%	25%	29%	
Eliminate fee waivers/ discounts for seniors	6%	2%	1.84	1.88	64%	12%	9%	6%	9%	62%	10%	12%	11%	6%	
Create & charge a non-motorized boat decal	5%	NA	2.33	NA	47%	9%	17%	15%	11%	Not Asked					
Statewide mill levy	5%	NA	2.47	NA	40%	9%	26%	16%	10%	Not Asked					
Dedicate a portion of Governor's proposed tourism tax for state parks	3%	NA	3.96	NA	12%	2%	13%	25%	48%	Not Asked					

\*1=Strongly Oppose, 5=Strongly Support

## **EXPENDITURE PROFILES AND ECONOMIC IMPACT**

One objective of this study was to estimate the economic impact associated with the expenditures of visitors to Montana's state parks and fishing access sites (FAS), both for the sites visited and their local areas, as well as for the rest of the state. To this end, survey respondents were asked to identify two types of expenditures incurred during their trip: those incurred at the site visited and its local area, and those incurred elsewhere in Montana, including those associated with their trip to the park or FAS.

The two types of expenditures were collected for nine different categories, including money spent on campground/RV park, hotel/motel, gasoline and oil, restaurant and bar, groceries and snacks, retail items, outdoor guide/outfitter, transportation fares, and licenses and entrance fees. It was later discovered that the sampling method employed in the study all but eliminated guides and their clients from being chosen for the sample. For this reason, the limited information provided in this category was deemed unrepresentative and thus excluded from this report. It is also important to note that only FAS visitors who spent a night at the site were surveyed as sampling was based on the information provided on camping fee envelopes collected at the various sites. Hence, information on FAS visitors refers only to over-night visitors to these sites.

The spending information gathered was combined with survey results presented elsewhere in this report, such as length of stay and group size (i.e. average number of people traveling together in one vehicle). Visitor numbers were supplied by Montana State Parks to generate expenditure profiles for the various visitor groups, as well as to estimate the magnitude of the economic impact of nonresident visitors to state parks and fishing access sites.

### **Expenditure Profiles**

When people, both residents and nonresidents, visit state parks and fishing access sites in Montana, they spend a considerable amount of money. Money spent around the state, away from the sites, is not solely attributable to the park or the FAS visited. However, the existence of the site contributed to visitors' choice of travel route as well as to their length of stay. In this analysis, the distinction is made between money spent in Montana as part of the total statewide tourism industry, away from the site visited and its local areas (denoted in this report as "Montana"), and money spent at the site or in its local area (referred to here as "Local Area").

### **Expenditure Patterns in Montana**

These spending profiles essentially describe money spent as people traveled around the state, including money spent specifically to get to and from an FWP site. The overall expenditure profile for all visitors is provided in Table 15. On average, park visitors and overnight FAS visitors spent \$32.29 per group per day around Montana. Not unexpectedly, the largest expenditure category was gasoline and oil at \$8.01.

**Table 15. Expenditures Per Group Per Day (Montana)**

Expenditure Category	Sample Size	Visitor Expenditures
Campground/RV park	864	\$2.09
Hotel/motel	864	\$6.87
Gasoline, oil	864	\$8.01
Restaurant, bar	864	\$5.75
Groceries, snacks	864	\$3.67
Retail	864	\$3.98
Transportation fares	864	\$0.96
Licenses, entrance fees	864	\$0.96
<b>Total</b>		<b>\$32.29</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

Montana expenses were different for residents of Montana who did not have far to travel compared to nonresidents who had different travel patterns. These differences are illustrated in Table 16. While Montana residents spent an average of \$8.57 per group per day around Montana, nonresidents spent over six times that amount, or \$57.58. Nonresidents outspent residents in all categories, but most dramatically on hotels/motels, licenses, and retail. These differences are to be expected for two reasons. First, residents tended to visit sites that were close to home, as is demonstrated by their mean travel distance of only 92 miles. This distance does not necessitate spending an extra night en route to the site. Nonresidents, on the other hand, traveled much farther (mean distance from home exceeded 500 miles) and as such spent more money on gas, and may have required at least one extra overnight with associated expenditures on gas, meals and retail shopping. Second, a trip to a state park or FAS appeared to be a one-destination trip for residents, while nonresidents made the trip to the site as one stop out of many on their way through Montana (the site was the only destination for 76% of residents and for 13% of nonresidents).

**Table 16. Resident vs. Nonresident Expenditures (Montana)**

Expenditure Category	Resident Sample Size	Resident Expenditures	Nonresident Sample Size	Nonresident Expenditures
Campground/RV park	446	\$0.47	418	\$3.81
Hotel/motel	446	\$0.86	418	\$13.28
Gasoline, oil	446	\$3.23	418	\$13.11
Restaurant, bar	446	\$1.68	418	\$10.09
Groceries, snacks	446	\$1.56	418	\$5.92
Retail	446	\$0.65	418	\$7.53
Transportation fares	446	0	418	\$1.99
Licenses, entrance fees	446	\$0.12	418	\$1.85
<b>Total</b>		<b>\$8.57</b>		<b>\$57.58</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

There were also differences in expenditure patterns between visitors to state parks and overnight visitors to fishing access sites. While park visitors spent an average of \$40.42 per group per day around Montana, away from the site, FAS visitors spent half that, or \$20.28. The most obvious difference was expenditures on hotels at \$10.32 for park visitors and \$1.73 for FAS overnight visitors, to be expected as only campers at fishing access sites were surveyed. Park visitors also spent more money on gas and restaurant meals, again likely a factor of distance from home and total travel time. Additionally, the trip to the site was a one-destination trip for 53 percent of FAS visitors, while only 39 percent of park visitors made only one stop. The only category where FAS visitors outspent park visitors was for licenses and entrance fees, where overnight fishing access site visitors spent \$1.09, compared to \$0.88 for park visitors, likely accounting for purchase of fishing licenses.

Table 17. Park Visitor vs. FAS Overnight Visitor Expenditures (Montana)

Expenditure Category	Park Visitor Sample Size	Park Visitor Expenditures	FAS Visitor Sample Size	FAS Visitor Expenditures
Campground/RV park	516	\$2.18	346	\$1.96
Hotel/motel	516	\$10.32	346	\$1.73
Gasoline, oil	516	\$9.46	346	\$5.88
Restaurant, bar	516	\$8.09	346	\$2.27
Groceries, snacks	516	\$3.62	346	\$3.77
Retail	516	\$4.65	346	\$2.99
Transportation fares	516	\$1.22	346	\$0.59
Licenses, entrance fees	516	\$0.88	346	\$1.09
<b>Total</b>		<b>\$40.42</b>		<b>\$20.28</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

By taking the analysis one step further, it becomes apparent that nonresident park visitors were the big spenders in terms of expenditures in Montana. While resident park visitors spent \$11.04 per group per day, nonresidents spent six times that amount, or \$66.11 (Table 18).

Table 18. Park Visitors: Resident vs. Nonresident (Montana)

Expenditure Category	Resident Park Visitor Sample Size	Resident Park Visitor Expenditures	Nonresident Park Visitor Sample Size	Nonresident Park Visitor Expenditures
Campground/RV park	240	\$0.68	276	\$3.49
Hotel/motel	240	\$1.03	276	\$18.45
Gasoline, oil	240	\$4.19	276	\$14.07
Restaurant, bar	240	\$2.47	276	\$13.01
Groceries, snacks	240	\$1.40	276	\$5.56
Retail	240	\$1.07	276	\$7.78
Transportation fares	240	0	276	\$2.28
Licenses, entrance fees	240	\$0.20	276	\$1.47
<b>Total</b>		<b>\$11.04</b>		<b>\$66.11</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

Nonresidents outspent residents as FAS visitors as well. Overnight resident visitors spent an average of \$5.78 per group per day around Montana, away from the site, compared to \$40.99 for nonresidents. The largest difference was money spent on licenses and entrance fees, at \$0.03 for residents compared to \$2.30 for nonresidents (Table 19).

**Table 19. FAS Overnight Visitors: Resident vs. Nonresident (Montana)**

<b>Expenditure Category</b>	<b>Resident FAS Visitor Sample Size</b>	<b>Resident FAS Visitor Expenditures</b>	<b>Nonresident FAS Visitor Sample Size</b>	<b>Nonresident FAS Visitor Expenditures</b>
Campground/RV park	204	\$0.23	142	\$4.44
Hotel/motel	204	\$0.68	142	\$3.23
Gasoline, oil	204	\$2.13	142	\$11.24
Restaurant, bar	204	\$0.77	142	\$4.41
Groceries, snacks	204	\$1.77	142	\$6.62
Retail	204	\$0.17	142	\$7.03
Transportation fares	204	0	142	\$1.42
Licenses, entrance fees	204	\$0.03	142	\$2.60
<b>Total</b>		<b>\$5.78</b>		<b>\$40.99</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

### **Expenditure Patterns in Local Area**

The other type of spending information requested from survey respondents was expenditures made at the site visited or its local area. For these expenditures, the total for both resident and nonresident visitors may be directly attributable to the state park or fishing access site visited. The overall average expenditure for all visitors was \$48.56 per group per day, slightly higher than for Montana-wide spending. Spending in the local areas was slightly higher throughout all the categories, except for hotels/motels. This exception was due to most survey respondents being overnight visitors to the parks or fishing access sites, likely camping at the site rather than staying in a hotel or motel in the local area (Table 20).

**Table 20. Expenditures per Group per Day (Local Area)**

<b>Expenditure Category</b>	<b>Sample Size</b>	<b>Visitor Expenditures</b>
Campground/RV park	864	\$5.26
Hotel/motel	864	\$4.40
Gasoline, oil	864	\$10.51
Restaurant, bar	864	\$8.61
Groceries, snacks	864	\$9.02
Retail	864	\$6.98
Transportation fares	864	\$1.00
Licenses, entrance fees	864	\$2.78
<b>Total</b>		<b>\$48.56</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

Again, when comparing resident expenditures to those of nonresidents, the differences are considerable. While resident visitors to state parks and fishing access sites spent an estimated \$31.70 per group per day, nonresident visitors spent more than twice that amount (\$66.57). Nonresidents spent somewhat more than residents on camping, and considerably more on hotels/motels. Their expenses for gas were higher, as were expenses for restaurant meals, groceries and retail (Table 21).

Table 21. Resident vs. Nonresident Expenditures (Local Area)

Expenditure Category	Resident Sample Size	Resident Expenditures	Nonresident Sample Size	Nonresident Expenditures
Campground/RV park	446	\$4.43	418	\$6.16
Hotel/motel	446	\$1.28	418	\$7.73
Gasoline, oil	446	\$8.29	418	\$12.88
Restaurant, bar	446	\$4.70	418	\$12.79
Groceries, snacks	446	\$8.04	418	\$10.08
Retail	446	\$3.03	418	\$11.19
Transportation fares	446	\$0.64	418	\$1.38
Licenses, entrance fees	446	\$1.29	418	\$4.36
<b>Total</b>		<b>\$31.70</b>		<b>\$66.57</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

Local area expenditure profiles for park and fishing access site visitors were more similar than any of the other comparisons made here, however the pattern is a reversal of that observed away from the local area. While park visitors spent \$46.79 per group per day, FAS visitors spent slightly more, or \$51.23 per group per day. At the state level, park visitors spent more than FAS visitors. The only category at the local area level where park visitors spent more than FAS visitors was for hotels/motels where they spent \$6.71 per day while FAS visitors spent only \$0.96. As mentioned above, only campers were intercepted at fishing access sites, accounting for this difference.

Table 22. Park Visitor vs. FAS Overnight Visitor Expenditures (Local Area)

Expenditure Category	Park Visitor Sample Size	Park Visitor Expenditures	FAS Visitor Sample Size	FAS Visitor Expenditures
Campground/RV park	516	\$5.16	346	\$5.44
Hotel/motel	516	\$6.71	346	\$0.96
Gasoline, oil	516	\$9.97	346	\$11.34
Restaurant, bar	516	\$9.37	346	\$7.53
Groceries, snacks	516	\$7.11	346	\$11.72
Retail	516	\$5.38	346	\$9.42
Transportation fares	516	\$1.02	346	\$0.97
Licenses, entrance fees	516	\$2.07	346	\$3.85
<b>Total</b>		<b>\$46.79</b>		<b>\$51.23</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

In the final breakdown, nonresident visitors emerged as the big spenders in the local areas as well. While resident park visitors spent \$30.19 per group per day, nonresidents spent over twice that amount, or \$61.42 per group per day. The largest difference was in the hotel/motel category, with nonresidents spending \$10.93 per group per day, compared to \$1.88 for residents (Table 23).



**Table 23. Park Visitors: Resident vs. Nonresident Expenditures (Local Area)**

Expenditure Category	Resident Park Visitor Sample Size	Resident Park Visitor Expenditures	Nonresident Park Visitor Sample Size	Nonresident Park Visitor Expenditures
Campground/RV park	240	\$4.87	276	\$5.44
Hotel/motel	240	\$1.88	276	\$10.93
Gasoline, oil	240	\$7.60	276	\$12.07
Restaurant, bar	240	\$4.80	276	\$13.38
Groceries, snacks	240	\$6.41	276	\$7.75
Retail	240	\$2.51	276	\$7.90
Transportation fares	240	\$0.65	276	\$1.35
Licenses, entrance fees	240	\$1.47	276	\$2.60
<b>Total</b>		<b>\$30.19</b>		<b>\$61.42</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

The resident/nonresident difference is even larger for local-area spending at fishing access sites. Residents spent \$33.31 per group per day, compared to well over twice that amount for nonresidents (\$76.60). As is the case for the other breakdowns, spending was higher throughout all categories (Table 24).

**Table 24. FAS Overnight Visitors: Resident vs. Nonresident Expenditures (Local Area)**

Expenditure Category	Resident FAS Visitor Sample Size	Resident FAS Visitor Expenditures	Nonresident FAS Visitor Sample Size	Nonresident FAS Visitor Expenditures
Campground/RV park	204	\$3.93	142	\$7.56
Hotel/motel	204	\$0.59	142	\$1.50
Gasoline, oil	204	\$9.10	142	\$14.47
Restaurant, bar	204	\$4.62	142	\$11.66
Groceries, snacks	204	\$9.66	142	\$14.60
Retail	204	\$3.68	142	\$17.59
Transportation fares	204	\$0.63	142	\$1.45
Licenses, entrance fees	204	\$1.10	142	\$7.77
<b>Total</b>		<b>\$33.31</b>		<b>\$76.60</b>

Note: All expenditures are average amounts spent per group per day. The amount reported for each item represents the average for all visitors to state parks or overnight visitors to fishing access sites and therefore does not represent the price actually paid for a particular item.

### Estimates of Total Spending and Economic Impact

Montana's state parks and fishing access sites represent an attraction for resident and nonresident visitors alike. When considering the magnitude of the economic impact attributable to these sites, it is the expenditures of nonresidents that are of primary interest. While an expenditure by a Montana resident benefits the business where it is spent, this money does not represent an injection of outside funds into the state economy. Money spent by nonresidents on the other hand, represents a net injection of new money, that is, funds that have been brought from outside the state and are spent and re-spent at Montana businesses. For this reason, only the nonresident expenditures have a net economic impact for the state as a whole.

It should be noted that the money spent by Montana residents in areas *away from their home communities* represents an economic impact to these areas. For example, if a Billings resident visited a park at Flathead Lake, the money he/she spent in communities around the lake would represent a net injection into these smaller economies. Estimating the magnitude of these induced impacts in specific areas is beyond the scope of this study.

However, since the direct expenditures of residents do benefit businesses in local areas around Montana, the dollar amount of these expenditures are presented here. The amount that both resident and nonresident visitors to these sites choose to spend in connection with their trips is an indication of the value placed on the state park and fishing access system in the state.

#### Total Spending Associated with Trips to State Parks and Fishing Access Sites

Total spending by visitors to state parks and overnight visitors to fishing access sites was estimated using the expenditure profiles reported in previous tables, along with study data on length of stay and group size (i.e. the average number of people traveling together in one vehicle). State Parks staff supplied estimates of resident and nonresident visitor numbers for parks and fishing access sites through October 2002, as well as information on the proportion of overnight visitors. Study data was gathered from selected sites within the state parks and FAS system. These sites were selected to be representative of all sites, allowing for extrapolation of the gathered data to be valid for visitors to the entire system, with the exception of day users of fishing access sites.

**Table 25. Calendar Year 2002 State Park and FAS System Visitation Estimates**

Region	Resident Park Visitors	Nonresident Park Visitors	Resident FAS Visitors	Nonresident FAS Visitors
Region 1	150,631	67,332	347,391	47,371
Region 2	87,900	42,191	504,356	138,021
Region 3	184,814	131,071	720,582	266,516
Region 4	128,720	51,918	247,570	82,523
Region 5	221,662	33,291	615,103	239,207
Region 6	N/A	N/A	64,648	3,403
Region 7	89,253	64,987	226,311	79,515
<b>Total</b>	<b>862,980</b>	<b>390,790</b>	<b>2,725,961</b>	<b>856,556</b>

Note: These estimates were generated for the calendar year 2002, based on October 2002 visitation projections. Therefore, final parks visitation numbers for 2002 may differ from the data in this table.

When considering total spending by all state park and FAS system visitors at both the state and local levels, the largest expenditure category was gasoline and oil. At close to \$51 million, it represents almost 24 percent of total spending. Expenditures on groceries and snacks represent another large category, at \$39 million or 18 percent of total spending, followed by restaurant expenditures (\$35.6 million, 16.7%), and money spent on retail purchases (\$25.8 million, 12.2%). The smallest expenditure category was transportation fares at \$5 million, or 2.4 percent of total spending. Spending by all visitors to the state park and by overnight visitors to fishing access sites totaled an estimated \$212 million, including money spent at the sites, in the local areas, and around Montana (Table 26).

**Table 26. Total Spending Profile**

Expenditure Category	Total Expenditures	Percent Share
Campground/RV park	\$22,367,000	10.5%
Hotel/motel	\$24,360,000	11.5%
Gasoline, oil	\$50,810,000	23.9%
Restaurant, bar	\$35,559,000	16.7%
Groceries, snacks	\$39,187,000	18.4%
Retail	\$25,885,000	12.2%
Transportation fares	\$5,091,000	2.4%
Licenses, entrance fees	\$9,166,000	4.3%
<b>Total</b>	<b>\$212,425,000</b>	<b>100.0%</b>

Of the \$212.4 million in total expenditures by visitors to state parks and overnight visitors to fishing access sites, 48 percent (\$101.7 million) was spent by Montana residents while 52 percent (\$110.7 million) was spent by nonresidents. Alternatively, 84 percent (\$179.6 million) was spent by visitors to state parks and 16 percent (\$32.8 million) was spent by overnight visitors to fishing access sites. *The reader is urged to keep in mind these components should not be recombined as this would double the actual estimate.*

**Table 27. Breakdown of Total Spending**

Visitor Type	Expenditures Elsewhere in Montana	Expenditures in Local Areas	Total Montana Expenditures
Resident Visitors (whole system)	\$5,615,000	\$96,073,000	\$101,688,000
Nonresident Visitors (whole system)	\$62,361,000	\$48,376,000	\$110,737,000
Park Visitors (resident and nonres.)	\$63,313,000	\$116,253,000	\$179,566,000
FAS Visitors (resident and nonres.)	\$4,663,000	\$28,196,000	\$32,859,000
<b>Total Visitor Population</b>	<b>\$67,976,000</b>	<b>\$144,449,000</b>	<b>\$212,425,000</b>

### Nonresident Economic Impact

Based on the estimates of nonresident visitor spending reported in Table 27 above, as well as overall expenditure patterns of nonresident visitors to state parks and fishing access sites in local areas and elsewhere in Montana, estimates of this group's economic impact on local areas and on the state were computed using the IMPLAN input/output model. The IMPLAN model was calibrated to the Montana economy as well as to specific expenditure patterns identified within the nonresident visitor group. *Please keep in mind that the economic impacts reported here are based only on nonresidents who visited state parks and nonresidents who visited fishing access sites and spent at least one night. The economic impact of nonresident day users of fishing access sites is not included in these estimates and, if included, would add to the total (Table 28).*

Impact estimates indicate that the amount spent by nonresidents at the sites visited and their local areas generated a sizeable economic impact on the Montana economy, both at the state level as well as at local levels. Nonresidents spent in excess of \$48 million at the sites and in the local areas. This amount generated \$38 million in increased industry output. In other words, these expenditures added over \$38 million to the economy's total production in all the affected industries<sup>1</sup> in communities across the state. Nonresident

<sup>1</sup> Industries most heavily affected include petroleum refining and sales, wholesale trade, retail trade (incl. food stores), hotels and lodging industries, and government.

expenditures also contributed approximately \$9 million in personal income. Personal income includes employee compensation, which is wages and salaries of workers who are paid by employers, and proprietary income, which is payments received by workers who are self-employed. Of the \$9 million contribution to personal income, the contribution to employee compensation was close to \$8 million, while the contribution to proprietary income was close to \$900,000. A total of 475 full-time and part-time jobs were also generated by nonresident expenditures. These jobs were concentrated in the areas of hotels and lodging places, service stations, grocery stores, retail, and amusement and recreation services.

In the rest of Montana, outside the sites and the local areas, nonresident visitors to state parks and fishing access sites spent close to \$62 million, in turn generating over \$54 million in industry output. These expenditures also contributed to the generation or maintenance of 855 full-time and part-time jobs, as well as \$17.7 million in personal income (\$16.5 million as employee compensation and \$1.2 million as proprietary income).

In all, nonresident visitors to state parks and overnight visitors to fishing access sites spent nearly \$111 million in the state during their trip, either at the site visited and its local area, or during their travels elsewhere in Montana. These expenditures contributed to the generation of 1,330 full-time and part-time jobs, generated \$92 million in industry output, as well as over \$26 million in personal income for Montana residents (\$24 million as employee compensation and \$2 million as proprietary income).

**Table 28. Nonresident Economic Impacts**

Category	Local Area	Elsewhere in Montana	Total Montana
Nonresident Expenditures	\$48,376,000	\$62,361,000	\$110,737,000
Impact on Output	\$38,102,000	\$54,357,000	\$92,459,000
Impact on Personal Income	\$8,850,000	\$17,699,000	\$26,549,000
<i>Employee Compensation</i>	\$7,953,000	\$16,498,000	\$24,451,000
<i>Proprietary Income</i>	\$897,000	\$1,201,000	\$2,098,000
Employment	475	855	1,330

Of the overall nonresident economic impact, 12 percent is attributable to nonresident overnight users of fishing access sites, while the remaining 88 percent is attributable to nonresident park users. This amounts to over \$81 million in output contributions for nonresident park visitors, \$23 million in contributions to personal income in Montana, and the addition or maintenance of 1,170 jobs. Nonresident overnight visitors to fishing access sites contribute \$11 million to increased output, \$3 million to personal income and 160 jobs (Table 29).

**Table 29. Nonresident Economic Impact: Park vs. Overnight FAS Users**

Category	Nonresident Park Users	Nonresident Overnight FAS Users	All Nonresident Users
Impact on Output	\$81,364,000	\$11,095,000	\$92,459,000
Impact on Personal Income	\$23,363,000	\$3,186,000	\$26,549,000
<i>Employee Compensation</i>	\$21,517,000	\$2,934,000	\$24,451,000
<i>Proprietary Income</i>	\$1,846,000	\$252,000	\$2,098,000
Employment	1,170	160	1,330

Region 3 receives the largest share of non-resident state park and overnight fishing access site visitation and as such also receives most of the economic benefit. Approximately 30 percent of the economic impact benefits this region. Region 1 and Region 5 are close in the shares of visitors they receive and are the beneficiaries of

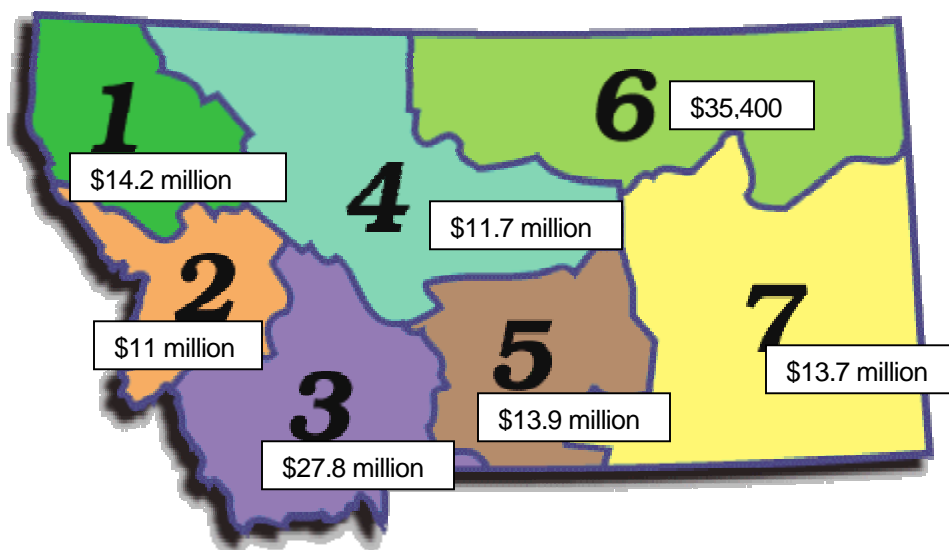
15.4 and 15.0 percent of the economic impact, respectively. Region 7 receives 14.8 percent while Region 4 receives 12.6 percent and Region 2 11.9 percent. Region 6 has the least amount of nonresident visitation at less than 1 percent and thus benefits the least from the economic impact (Table 30).

**Table 30. Nonresident Economic Impact by Region**

Region	Output	Personal Income	Employee Compensation	Proprietary Income	Employment
Region 1	\$14,217,800	\$4,082,500	\$3,759,900	\$322,600	205
Region 2	\$11,084,600	\$3,182,900	\$2,931,400	\$251,500	159
Region 3	\$27,847,800	\$7,995,900	\$7,364,400	\$631,900	401
Region 4	\$11,670,000	\$3,351,000	\$3,086,200	\$264,800	168
Region 5	\$13,905,600	\$3,992,900	\$3,677,400	\$315,500	200
Region 6	\$35,400	\$10,200	\$9,400	\$800	1
Region 7	\$13,697,800	\$3,933,200	\$3,622,400	\$310,800	197

Note: The numbers in Table 30 may not add to the numbers in the "All Nonresident Users" column of Table 29 due to rounding.

Figure 1: Nonresident Economic Impact - Industry Output by Region



In conclusion, nonresidents spent more than residents while visiting state parks and fishing access sites, both near the site and in other areas of Montana. This can be attributed to distance from home and length of trip. Nonresidents spent 5 nights in Montana away from home while residents spent 2 nights away from home. Nonresident park visitors spent twice as much as resident park visitors, while nonresident overnight FAS visitors spent more than double that of resident FAS visitors. However, in all these comparisons, it must be noted that nonresidents represented only 31 percent of state park visitors and 24 percent of all FAS overnight visitors in 2002, according to Montana State Park visitation estimates (Table 25).



## APPENDIX A: QUESTIONNAIRE

Introduction: Hello, my name is \_\_\_\_\_, I'm calling from The University of Montana in Missoula. We're doing important research on Montana's State Parks and Fishing Access Sites for the Montana Department of Fish, Wildlife, and Parks.

May I speak with \_\_\_\_\_?

If R, say:

Eligibility 1. For this survey only persons age 18 and older may be interviewed. Are you 18 years of age or older?

1 Yes Proceed with Q1  
0 No If no, ask for adult trip participant, re-intro

Eligibility 2. IF NOT R not available: Did you go on the trip to \_\_\_\_\_ along with R?

1 Yes Ask Eligibility 1  
0 No Make appt.

READ THE FOLLOWING CONFIDENTIALITY STATEMENT TO ALL RESPONDENTS

Before we start, I want to assure you that this interview is completely confidential and voluntary. If we should come to a question you don't want to answer; just let me know and we'll go on to the next question. This interview will take about 10 minutes.

1. First, we'd like some information about your trip to (Park or fishing access site). Did you start your trip from your permanent home or principal residence?

Yes skip to 2  
No

1a. From what city and state did you start your trip from?

\_\_\_\_ city/town  
\_\_\_\_ state

2. Where is your permanent home or principal residence?

\_\_\_\_ city/town

\_\_\_\_ state  
In this survey we will ask about (Park or fishing access site). We are also interested in the local area around (Park or fishing access site). For this survey, the local area is within 50 miles of (Park or fishing access site).

3. About how many miles is it one way from where you started your trip to (Park or fishing access site)?

\_\_\_\_ miles one way

4. Was (Park or fishing access site) your only destination or one of several places you visited on that trip?

only destination skip to 5  
one of several places/areas visited

4a. Was it your principal destination?

1 Yes  
0 No

5. Was this your first visit to the site?

1 Yes

No

6. On your trip, did you travel alone or were there other people with you?

Traveled alone skip to 7  
Traveled with other person(s)

6a. How many people traveled in your vehicle with you, including yourself?

\_\_\_\_ # people

if MORE THAN 1

6b. Which category best describes the group you traveled with?

1 Couple  
2 Family members  
3 Group of friends  
4 Family and friends  
5 Organized group or club  
6 Business associates



Now we'd like some information about the length of your trip.

**7. First, for how many total nights were you or your group away from your permanent residence on this trip?**

\_\_\_\_\_ nights, if 0 skip to 11

**8. How many total nights did your group stay in Montana on this trip?**

\_\_\_\_\_ nights

**9. How many nights did your group stay at (Park or fishing access site) or in the local area?**

\_\_\_\_\_ nights

**10. Please tell us whether any member of your group participated in the following recreational activities while at (Park or fishing access site) or in the local area.**

	<u>Yes</u>	<u>No</u>	
		☆	☆
a. Fishing .....	1	0	
b. Picnicing, day use...	1	0	
c. Overnight camping except backpacking .....	1	0	
d. Backpacking .....	1	0	
e. Day hiking .....	1	0	
f. Wildlife watching, nature study .....	1	0	
g. Visiting scenic or historic sites, museums, etc. ....	1	0	
h. Entertainment activities, outdoor performances, fairs, festivals, ceremonies, etc. ....	1	0	
i. Driving off-road vehicles or motorcycles	1	0	
j. Bicycling .....	1	0	
k. Motorboating, waterskiing, jet skiing ...	1	0	

l. Sailing, rafting, canoeing, rafting, floating, windsurfing, etc. ....	1	0
m. Swimming .....	1	0
n. Jogging, running .....	1	0
o. Horseback riding .....	1	0
p. Games like baseball or volleyball .....	1	0
q. Visiting friends or relatives, reunions .....	1	0
r. Dining for pleasure	1	0
s. Shopping .....	1	0
t. Other (please describe) _____	1	0

**Now we'd like to ask some questions about your satisfaction with (Park or fishing access site).**

**11. How would you rate your overall satisfaction with (Park or fishing access site) on a scale from one to five where one is not at all satisfied and five is very satisfied.**

1	Not at all satisfied
2	
3	
4	
5	Very satisfied

12. What did you like best about (Park or fishing access site)?

---

13. What did you like least about (Park or fishing access site)?

---

14. Next I'm going to list some features that may have been present in (Park or fishing access site). Please rate your satisfaction with each of these features on a scale from one to five where one is not at all satisfied and five is very satisfied. A Don't Know and a Not Applicable option will be available but un-read.

	Not at all Satisfied ☆			Very Satisfied ☆		
a. Roads .....	1	2	3	4	5	
b. Parking .....	1	2	3	4	5	
c. Trails .....	1	2	3	4	5	
d. Signs .....	1	2	3	4	5	
e. Interpretive displays	1	2	3	4	5	
f. Rest rooms .....	1	2	3	4	5	
g. Water supply .....	1	2	3	4	5	
h. Picnic area .....	1	2	3	4	5	
i. Campground .....	1	2	3	4	5	
k. Boat ramp .....	1	2	3	4	5	
l. Boat dock .....	1	2	3	4	5	
m. Beach .....	1	2	3	4	5	
n. Shelters .....	1	2	3	4	5	
o. Showers	1	2	3	4	5	
p. Staff service	1	2	3	4	5	

15. Next we'd like to ask you about some of the things you paid for on your trip. In particular, we'd like to know how much you spent for each of the following things while you were in Montana and while you were visiting (Park or fishing access site) OR its local area. Your best guess about the amount you spent is OK.

	<u>MT</u> ☆	<u>Local Area</u>
a. Campground facility, RV Park .....	\$	\$
b. Hotel, motel, bed & breakfast, etc. ....	\$	\$
c. Gasoline, oil .....	\$	\$
d. Restaurant, bar .....	\$	\$
e. Groceries, snacks ...	\$	\$
f. Other retail goods, like t-shirts, fishing supplies, etc. ....	\$	\$
g. Outdoor guides, outfitters .....	\$	\$
h. Transportation ex. car rental. ....	\$	\$
i. Licenses, entrance fees .....	\$	\$
k. Prepare for your trip	\$	\$
l. Other (please describe)		
_____	\$	\$

16. Did you fly on a commercial air carrier for any portion of this trip?

1 Yes  
No

17. Did you rent an automobile for any portion of this trip?

1 Yes go to 17a  
0 No skip to 18

17a. In what state or Canadian Province did you rent it?

- 1 Colorado
- 2 Idaho
- 3 Montana
- 4 Oregon
- 5 Utah
- 6 Washington
- 7 Wyoming
- 8 Alberta
- 9 British Columbia
- 10 Other

The next set of questions ask about funding for Montana's state parks.

18. The Montana Department of Fish, Wildlife, and Parks estimates that within two years State Parks will be operating at a deficit, even with no new construction for maintenance or improvements.

Please tell us how much you support or oppose each of the following funding options for STATE PARKS on a scale from one to five where one is strongly oppose and five is strongly support. Ask tax items of MT residents only.

- |  | Strongly<br>Oppose<br>☆ |   |   |   | Strongly<br>Support<br>☆ |
|--|-------------------------|---|---|---|--------------------------|
| a. Increase user fees at state parks .....   | 1                       | 2 | 3 | 4 | 5                        |
| b. Increase the proportion of existing state taxes that go to parks ..   | 1                       | 2 | 3 | 4 | 5                        |
| c. Increase state taxes to fund state parks ....   | 1                       | 2 | 3 | 4 | 5                        |
| d. Cut services and maintenance .....  | 1                       | 2 | 3 | 4 | 5                        |
| e. Eliminate the current \$4 day use fees and replace them with a statewide, mandatory, once a year \$4 fee on license plate registration that allows for unlimited use of state parks ..... | 1                       | 2 | 3 | 4 | 5                        |

f. Start a fee system in which premium camping sites cost more than sites in other parks ..... 1 2 3 4 5

g. Charge additional fees for special events, fire wood, and other secondary items ..... 1 2 3 4 5

h. Increase the cost of the state parks season pass ..... 1 2 3 4 5

i. Eliminate fee waivers and discounts for seniors ..... 1 2 3 4 5

j. Create and charge for a non-motorized boat decal ..... 1 2 3 4 5

k. A statewide mill levy for state parks ..... 1 2 3 4 5

l. Dedicate a portion of the Governor's proposed tourism tax to fund state parks ..... 1 2 3 4 5

The last few questions are for classification purposes only.

19. What was your age on your last birthday?

\_\_\_\_\_ years

20. What is the highest degree or level of school you have completed?

- 1 Grades 1-8 (Elementary)
- 2 Grades 9-12 (Some high school but no diploma)
- 3 Grade 12 or GED (High school graduate)
- 4 College 1 year to 4 years (Some college or technical school, but no degree)
- 5 College 1 year to 4 years (Associate Degree)
- 6 College 4 years or more (College grad. BA, MA, JD, MD, PhD)

21. Which of the following categories best describes your total household income from all sources in the year 2001 before taxes and other deductions?

- 1 Less than \$10,000
- 2 \$10,000 - \$19,999
- 3 \$20,000 - \$29,999
- 4 \$30,000 - \$39,999
- 5 \$40,000 - \$49,999
- 6 \$50,000 or more

23. What is your race? Choose one for each listed below.

	<u>Yes</u> ☆	<u>No</u> ☆
a. White.....	1	0
b. American Indian or Alaska Native .....	1	0
c. Spanish or Hispanic Origin, such as Mexican, Central American, Puerto Rican, or Cuban .....	1	0
d. Black, African American, or Negro .....	1	0
e. Asian or Pacific Islander .....	1	0
f. Other (Specify)		
_____	1	0

**Thank You Very Much for Your Time and Effort!**

24. Complete after interview **Respondent's Sex.**

- 1 Female
- 0 Male

